



November 2013

Dear Friends,

In the spirit of remembrance for loved ones now gone and thankfulness for the many blessings we have been given, the Fulcrum Foundation extends its heartfelt gratitude to our major contributors to our mission, through the annual drive, planned gifts, and the Celebration of Light. You make a real difference in the lives of students, staff and schools throughout the Archdiocese.

The Fulcrum Foundation is honored to play an important role in supporting the growth of schools and their continued ability to provide accessible and excellent Catholic education. This is the latest in an ongoing e-news series with the goal of sharing exciting happenings in our schools thanks to your support.



Sue Mecham, MNPL Managing Director



Elisa Cooper, Development Specialist

Reach Your Goals This Year... It's Not Too late!

Have you thought about your remaining goals for this year? If you are like many people, your goals may look like this:

My Goals: *Increase my income, Lower my taxes, Help a loved one, Give to charity...*

If you want to reach one or more of these goals, we can help. [Visit our website](#) or **contact us** to learn about personal and financial planning options that can help you realize your goals.



Did you know that you can reduce your taxes for 2013 by making a gift from your IRA to charity?

The fiscal cliff act permits individuals who are 70½ to rollover up to \$100,000 from their IRA to charity free from federal income tax. Better yet, an IRA rollover gift qualifies for your 2013 required minimum distribution, permitting you to lower your income and taxes for this year while helping the Fulcrum Foundation's cause. **Contact us to learn more** about how you can redirect unneeded IRA income to charity, help further Fulcrum's mission and enjoy valuable tax savings this year.



PERSONAL PLANNER

Wills - Good and Bad

More than 40 wills were submitted to the probate court, with a multitude of potential heirs each claiming to be the true recipient of a wealthy business owner who passed away in 1976. [Read More](#)

SAVVY LIVING

Reassessment Time for Medicare Part D Beneficiaries

I have been enrolled in the same Medicare prescription drug plan for three years, but my pharmacist told me I should look for a new plan that would fit my needs a little better during the open enrollment period. What's the easiest way to do this? [Read More](#)

YOUR PLAN

Patricia

A familiar figure in our Catholic school community, Patricia ("Patty") grew up attending Catholic schools, starting with St. Joseph School in Vancouver. [Read More](#)

WASHINGTON NEWS

Budget Committee Cordial But Direct

On October 31 the official first meeting occurred for the House and Senate Budget Conference Committee. The 29 members of the committee were each given five minutes to make opening statements. [Read More](#)

FINANCES

Stocks - Apple Reports Record iPhone Sales [Read More](#)

Bonds - Treasury Yields Rise on Economic Reports [Read More](#)

CDs and Mortgages - Interest Rates Continue Descent [Read More](#)

Once again, Thank you for your interest in supporting Catholic education. To read more about financial and gift planning with the Fulcrum Foundation, or to access more resources, please visit our [website](#).

